

# Chevron Severance Checklist: What Should You Do?



When it comes to leaving the workplace and beginning retirement, there are many questions that need to answering: When should you take Social Security? How long do you need to make your money last?

Our team has put together a helpful checklist to help you make informed financial decisions.

- Understand EOI and Your Chevron Retirement Benefits**  
Review your company's benefits to understand what's available to you, such as severance or retirement packages. Decide how you will pay for health insurance before becoming eligible for Medicare.
- Develop a Budget and Track Your Expenses**  
Create a spending plan by identifying which expenses are essential and cannot be changed, which can help you make better financial decisions.
- Evaluate Your Retirement Income Sources**  
Conduct a comprehensive review of your Social Security, pension, and personal savings to optimize your retirement income.
- Calculate Your Retirement Readiness Score**  
Determine if you have enough money for retirement by running a comprehensive probability analysis.
- Formulate a Tax-Smart Withdrawal Strategy**  
It's wise to create strategic withdrawal plan tailored to your tax bracket. This approach can help minimize tax impacts and potentially extend the longevity of your savings.
- Consider Working with a Financial Advisor**  
Assistance from a fiduciary advisor can remove the uncertainty of an unplanned retirement and provide peace of mind.

Schedule a complimentary Retirement Readiness Assessment with one of our financial advisors by calling (888) 895-4797, or scanning the QR Code below.



# DISCLOSURES

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